

NCFE

CACHE

Sample Assessment Materials (SAMs) Optional Unit- Theatre Support

**NCFE CACHE Level 3 Technical Occupational Entry in
Senior Healthcare Support (Diploma)
QN: 610/3988/3**

Contents

THEA 1: perform the non-scrubbed circulating role for perioperative procedures	5
Scenario	5
Task 1	5
Task 2	5
Task 3	6
Task 4	6
THEA 2: receive and handle clinical specimens within the sterile field	9
Scenario	9
Task 1	9
Task 2	9
Task 3	9
Task 4	9
THEA 3: prepare anaesthetic environment and provide support for pre-and post-operative anaesthesia and recovery	12
Scenario	12
Task 1	12
Task 2	12
Task 3	13
Task 4	14
THEA 4: contribute to the safe use of medical devices in the perioperative environment	16
Scenario	16
Task 1	16
Task 2	17
Task 3	18
Task 4	18
THEA 5: provide support to the surgical team when preparing individuals for operative and invasive procedures	20
Scenario	20
Task 1	20
Task 2	20
Task 3	20
Task 4	21
Task 5	21
Task 6	21
Task 7	21

Task 8	22
THEA 6: assist in receiving, handling and dispatching clinical specimens	24
Scenario	24
Task 1	24
Task 2	24
Task 3	24
THEA 7: transport, transfer and position individuals and equipment within the perioperative environment.....	26
Scenario	26
Task 1	26
Task 2	26
Task 3	27
Task 4	27
Task 5	27
Task 6	27
Task 7	27
THEA 8: measure and record individuals' body fluid balance in a perioperative environment.....	30
Scenario	30
Task 1	30
Task 2	30
Task 3	31
THEA 9: assist in the delivery of perioperative care and support the individual.....	33
Scenario	33
Task 1	33
Task 2	33
Task 3	34
Task 4	34
Task 5:	34
THEA 10: prepare and dress for scrubbed clinical roles.....	36
Scenario	36
Task 1	36
Task 2	36
Task 3	36
THEA 11: prepare and provide surgical instrumentation and supplementary items for the surgical team.....	38
Scenario	38

Task 1	38
Task 2	38
Task 3	39
Task 4	40
THEA 12: prepare and apply dressings and drains to individuals in the perioperative environment 42	
Scenario	42
Task 1	42
Task 2	42
Task 3	42
Task 4	43
Change history record	45

THEA 1: perform the non-scrubbed circulating role for perioperative procedures

Scenario

You are on rotation working in an operating theatre. You are helping the theatre practitioner set up the theatre for the first surgical procedure of the day.

This will include preparing the correct documentation for the theatre and procedure as well as following specific instructions for that theatre and the procedure that will be performed.

You will also bring equipment into the theatre and add equipment onto the sterile field without compromising its sterility.

Task 1

You are required to produce a reflective account.

You must fully respond to all the questions written below:

- referring to your knowledge and experience, explain the standard precautions to be carried out preoperatively on all the equipment in the theatre, including post operative checks (AC1.1)
- referring to your own knowledge and experience, explain the potential consequences of not following the above outlined preoperative and post operative checks on equipment (AC1.2)
- referring to your own knowledge and experience, explain the local systems and protocols for team time out, sign out and debriefing and its importance to the surgery (AC1.3)
- referring to your own knowledge and experience, explain local policies and procedures regarding the correct handling of contaminated items (AC1.4)
- referring to your own knowledge and experience of infection prevention control describe how to maintain a sterile field (AC1.5)
- referring to your own knowledge and experience of infection prevention control state the procedure to be followed when there is a breakdown in the sterile field (AC1.6)
- referring to local and national policies and procedures state how to dispose of contaminated or potentially hazardous waste. (AC1.7)

Task 2

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace performing the non-scrubbed circulating role for perioperative procedures in line with policies, protocols and good practice.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include, in detail, what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed applying preoperative standard precautions for the provision and		

monitoring of medical equipment, devices and items (AC2.1)		
The learner is observed applying local systems and protocols for team time out, sign out and debriefing (AC2.2)		
The learner is observed demonstrating local policies and procedures regarding the correct handling of contaminated items (AC2.3)		
The learner is observed disposing of contaminated items and treating hazardous waste in line with local and national policies and protocols (AC2.4)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Task 3

You are required to create and deliver a presentation.

You are required to deliver a presentation based on how medical devices are used for surgical interventions. You can choose an acceptable format, for example PowerPoint presentation, making sure it is easy to understand and engaging to your intended audience.

You are required to carry out research and identify no more than 15 medical devices used for surgical interventions.

You must include the following in your presentation:

- the purpose and function of the medical devices
- potential hazards
- the suitability of the different types of surgical instrumentation for different procedures
- specifically identify equipment that can be used for weighing swabs and counting instruments
- an explanation of actions to take when problems arise with a medical device
- an explanation of potential consequences of not following procedures.

(AC3.1, 3.2, 3.3, 3.4, 3.5, 3.6)

Task 4

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace working with medical devices and equipment for clinical procedures in accordance with requirements.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed applying standard precautions for infection prevention control (AC4.1)		
The learner is observed implementing health and safety measures relevant to the procedure and environment (AC4.2)		
The learner is observed obtaining, preparing and setting up the medical devices in the correct position in line with local policies and protocols observing infection prevention control (AC4.3)		
The learner is observed applying correct use, care and storage of medical devices and equipment in line with manufacturer's instructions and local policies and protocols (AC4.4)		
The learner is observed working with the appropriate person to monitor and count surgical instruments, swabs, and sharps in line with national and local policies and protocols (AC4.5)		
The learner is observed carrying out the tracking and tracing of sterile items (AC4.6)		
The learner is observed disposing of clinical and hazardous waste safely and in accordance with local policies and protocols (AC4.7)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

THEA 2: receive and handle clinical specimens within the sterile field

Scenario

During a surgical procedure, a frozen sample is taken and given to you to go immediately to pathology. Later, you get another specimen for histology. This will also be sent to pathology towards the end of the case.

Task 1

You are required to complete the table.

Identify different types of specimens, the containers they require, and how they will be handled and transported to pathology:

Specimen	Container	Handling and Transportation

(AC1.1, 1.2, 1.3)

Task 2

You are required to complete a written explanation.

The histology specimen has been wrongly labelled, but this was determined before the specimen went down to pathology.

Explain the potential consequences of poor practice related to the handling, labelling, and transporting of clinical specimens and how this would be rectified before it went to pathology. (AC1.4)

Task 3

You are required to complete a written summary.

When receiving and handling specimens PPE is decremental due to chemicals and preventing specimen contamination.

Summarise the hazards associated with receiving and handling clinical specimens and the contamination of a clinical specimen. (AC1.5, 1.6)

Task 4

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace receiving and handling clinical specimens within the sterile field.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed applying standard precautions for infection control (AC2.1)		
The learner is observed implementing health and safety measures relevant to handling clinical specimens (AC2.2)		
The learner is observed obtaining valid consent to collect clinical specimens (AC2.3)		
The learner is observed confirming correct container and transport medium for the type of clinical specimen being collected (AC2.4)		
The learner is observed receiving specimens in line with local policies and procedures (AC2.5)		
The learner is observed maintaining the sterile field when passing specimens to the appropriate person (AC2.6)		
The learner is observed ensuring specimens are labelled and documentation has been completed in line with local policies and procedures (AC2.7)		

The learner is observed processing and dispatching clinical specimens in line with local policies and procedures (AC2.8)		
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Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

THEA 3: prepare anaesthetic environment and provide support for pre-and post-operative anaesthesia and recovery

Scenario

You are the healthcare assistant aiding the anaesthetic practitioner preparing for a procedure in the minor theatre.

Task 1

You are required to produce a reflective account.

As part of this task, you must fully respond to all the questions written below:

- explain the standard precautions needed to ensure the anaesthetic / recovery environment is safe and the potential consequences of poor practice (AC1.1)
- referring to your knowledge and experience, state the importance of wearing the required PPE in the anaesthetic room and recovery environment (AC1.2)
- using your experience and knowledge, explain the importance of using equipment in line with manufacturers' instructions and local policies and protocols (AC1.3)
- explain how low stock levels of linen, disposables, and fluids could affect a patient in the anaesthetic / recovery environment (AC1.4)
- referring to your knowledge of local policies and protocols, explain team briefing and patient sign in and the completion of pre- and post-operative checklists from the anaesthetic / recovery environment (AC1.5, 1.6)
- state examples of clinical emergencies in the anaesthetic / recovery environment. Explain how you would recognise and respond to these clinical emergencies, also explain what support you would provide to the registered practitioner. (AC1.7)

Task 2

You are required to produce a reflective account.

Referring to your knowledge and experience, state the normal parameters for the following:

- temperature
- pulse
- blood pressure
- respiration
- oxygen levels
- urinary output.

(AC2.1)

Referring to your knowledge and experience, explain how to measure the following vital signs:

- temperature
- blood pressure
- respiration
- oxygen levels
- urinary output.

(AC2.2)

Explain how anaesthesia can affect a patient's:

- temperature
- pulse

- blood pressure
- respiration
- oxygen levels
- urinary output.

(AC2.3)

Referring to your knowledge and experience, explain the common adverse reactions to anaesthesia and recovery care patients experience. (AC2.4)

Following local policies and protocols, outline your actions when presented with issues beyond your competence in the anaesthetic / recovery environment. (AC2.5)

Task 3

This task requires a completed observation grid.

Direct observation / expert witness testimony.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace preparing the anaesthetic environment and providing support for pre- and post-operative anaesthesia and recovery.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
Learner is to be observed implementing safety measures while using anaesthetic / recovery equipment (AC3.1)		
Learner is observed following infection prevention measures in the anaesthetic / recovery environment by disposing of contaminated items and cleaning used equipment following local policies and protocols (AC3.2, 3.5, 3.6)		
Learner is observed making the necessary equipment and documentation available for the registered practitioner (AC3.3)		
Learner is observed documenting and reporting any equipment that is unfit for use according to local policies and protocols (AC3.4)		

Learner is observed maintaining stock of linen, fluids, and disposable items in the anaesthetic / recovery environment (AC3.7)		
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Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Task 4

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace preparing anaesthetic environment and providing support for pre- and post-operative anaesthesia and recovery.

Note to Assessor / Expert Witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
Learner exhibits understanding of valid consent by confirming individual's identity and gaining consent through the completion of the pre-and post-operative checklist (AC4.1, 4.2)		
Learner is observed maintaining the privacy, dignity and comfort during the individual's transfer to and from the anaesthetic / recovery environment (AC4.3)		
Learner shows competence by working within the spheres of own competence and recognises when to refer on issues (AC4.4)		
Learner uses verbal and non-verbal skills to support individual prior to and after anaesthesia / sedation, overcoming any possible communication difficulties		

(AC4.5)		
Learner is observed giving adequate support to registered practitioner during assessment, management and reassurance of the individual in the anaesthetic / recovery environment (AC4.6)		
Learner is to be observed monitoring, measuring and recording clinical observations of individual assigned to them by the registered practitioner, reporting any deviations following the care plan (AC4.7, 4.8)		
Learner is to be observed recording relevant information following local policies and protocols (AC4.9)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

THEA 4: contribute to the safe use of medical devices in the perioperative environment

Scenario

You are the support staff delegated to keep medical devices safe for use in the perioperative environment.

Task 1

You are required to produce a reflective account and as part of this complete the 2 tables.

As part of this task, you must fully respond to all the questions written below:

- explain how a sterile field is maintained in a perioperative environment (AC1.1)
- referring to your knowledge and experience complete the table below, identifying a range of medical devices and explain the sterilisation process used. (AC1.2)

Medical device	Explanation of sterilisation process used

- explain the importance of traceability systems and recording mechanisms in health and safety (AC1.3)
- referring to your knowledge, explain the importance of compliance, considering specific organisational health and safety policies and procedures for medical devices (AC1.4)
- referring to your knowledge, explain the implications of non-compliance when considering organisational health and safety policies and procedures (AC1.5)
- referring to your knowledge and experience, state how to segregate and dispose of medical devices and waste material following local policies and guidelines (AC1.6)
- referring to your knowledge and experience, complete the table below and identify different types of waste and spillage and how to dispose of them. (AC1.7)

Waste	Spillage	Correct and safe disposal

Task 2

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace contributing to the safe use of medical devices in the perioperative environment.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
Learner is observed applying with understanding the standard infection control measures (AC2.1)		
Learner is observed implementing health and safety measures relevant to handling medical devices (AC2.2)		
Learner is observed following procedures, ensuring that medical devices are: <ul style="list-style-type: none">• in working condition• stored correctly• used correctly• rotated correctly (AC2.3, 2.4)		
Learner is observed documenting and reporting any shortage of supplies in line with local policies and procedures (AC2.5)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Task 3

You are the individual in charge of medical devices during a procedure.

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace contributing to the safe use of medical devices in the perioperative environment.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
Learner is observed confirming the integrity and content of instrument trays, including expiry dates prior to a procedure by going through it with a registered practitioner (AC3.1, 3.2)		
Learner is observed following tracking and traceability procedures for the safe use of instrument trays (AC3.3)		
Learner is observed replacing missing items and reporting discrepancies to the appropriate person (AC3.4, 3.5,)		
Learner is observed identifying, recording, and reporting any faulty equipment, instruments or soft pack items to the appropriate team member (AC3.6)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Task 4

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace contributing to the safe use of medical devices in the perioperative environment.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
Learner is observed identifying single-use items and disposing of them correctly (AC4.1)		
Learner is observed decontaminating and sterilising of surgical equipment in line with local policies and protocols, if applicable (AC4.2)		
Learner is observed ensuring empty pack containers, trays and used medical devices are placed in the appropriate location for collection (AC4.3)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

THEA 5: provide support to the surgical team when preparing individuals for operative and invasive procedures

Scenario

A patient is coming for a lumbar decompression and fusion, this is an invasive procedure and will need specific equipment and surgical instruments. The patient will be in a prone position and will need plenty of support. A representative will also be present to advise during the procedure and will require you to hand over sterile single use items to the scrub practitioner without compromising the sterile field.

Task 1

You are required to produce a written explanation.

Explain how to apply the standard precautions when preparing a patient for an invasive procedure, including:

- an explanation of the importance of applying standard precautions to the health and safety of the patient
- a holistic assessment of that patient
- identification of the potential sources of contamination whilst preparing the patient.

Task 2

You are required to produce a written explanation.

A lot of single use items will be used during the procedure, explain the dangers of reusing these items. (AC1.4)

Task 3

You are required to complete the table below:

List the types, purposes, and functions of surgical instruments and supplementary items in the surgical environment with a description of the potential hazards of using these instruments and ways to minimise the risk of harm.

Surgical instruments or supplementary item	Purpose	Function	Potential hazard	Minimise risk of harm

(AC2.1, 2.2)

Task 4

You are required to produce a written description.

Describe the factors affecting the choice of surgical instruments and supplementary items, including the cost implications and the impact of those implications on the commissioning of services. Give examples of these, for example, what are the cost implications for a small plastics case in comparison to a lumbar decompression and fusion case? (AC2.3, 2.4, 2.5)

Task 5

You are required to produce a written explanation.

Identify and give examples of factors that inform the choices of sites for attachment of surgical instruments. (AC2.6)

Task 6

You are required to produce a leaflet.

Explain how different types of skin preparations and surgical drapes are used to provide barriers to cross infection. (AC2.7)

Task 7

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace assisting in the preparation of an operative and invasive procedure.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed confirming the individual's identification and gaining valid consent (AC3.1)		

The learner is observed applying standard precautions for infection, prevention, and control (AC3.2)		
The learner is observed implementing health and safety measures relevant to the procedure and environment (AC3.3)		
The learner is observed identifying the individual's operative site and clarifying any queries with the appropriate person (AC3.4)		
The learner is observed supporting other members of the team to prepare the individual for an operative or invasive procedure maximising their dignity, comfort, and safety (AC3.5)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Task 8

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace selecting, handling and disposing of surgical instruments and supplementary items while assisting in the preparation of an operative and invasive procedure.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed selecting and handling surgical instruments and supplementary items safely and in line with the manufacturers' instructions (AC4.1)		
The learner is observed selecting an appropriate site in the sterile field for attaching surgical instruments and supplementary items (AC4.2)		
The learner is observed accounting for and recording all items and swabs used in the preparation of the operative site in line with local policies and protocols (AC4.3)		
The learner is observed disposing of waste in line with local policies and protocols (AC4.4)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

THEA 6: assist in receiving, handling and dispatching clinical specimens

Scenario

You are the support staff in an endoscopy procedure where twenty specimens were taken from five individuals.

Task 1

You are required to create an information leaflet.

Create an information leaflet on receiving, handling and dispatching clinical specimens that could be given to work experience students.

You will need to ensure that the information is accessible and engaging to the chosen group, using appropriate terminology for your intended audience.

Your guide should include the following:

- the standard precautions for infection control pertaining to the receiving, handling, and dispatching of specimens
- an outline of the step-by-step process, with supporting description for maintaining the sterile field
- a step-by-step process of the actions to be taken when the sterile field is compromised.

(AC1.1, 1.2, 1.3)

Task 2

You are required to produce a written explanation.

As part of this task, you must fully respond to all the questions written below:

- outline the various types of specimen pots, their uses and mode of dispatching following local policies and guidelines (AC2.1)
- explain the types of specimens in the perioperative environment, how they are handled and dispatched to the laboratory for investigation (AC2.2)
- a specimen pot was mislabelled and placed in the wrong bag - referring to your experience and knowledge, state the consequences of this event. (AC2.3)

Task 3

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace assisting others to receive, handle, label and dispatch clinical specimens.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
Learner is observed applying standard precautions for infection control in the receiving and handling of specimens (AC3.1)		
Learner is observed applying health and safety measures relevant to handling clinical specimens (AC3.2)		
Learner is observed: <ul style="list-style-type: none"> • using the right specimen pot and transport medium for histology and microbiology samples as directed by the appropriate person • following local policies and guidelines for the receiving, handling, labelling and recording of information on clinical specimens as directed by the appropriate person • updating records in line with policies and notifying the appropriate person of any queries beyond their competence (AC3.3, 3.4. 3.5, 3.6)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

THEA 7: transport, transfer and position individuals and equipment within the perioperative environment

Scenario

The plastics list has 3 patients, a breast reconstruction, tendon repair on the hand, and axillary lymph node dissection. Each patient will need to be positioned in a different way, requiring different equipment for each procedure. The equipment used will be to make the areas operated on more accessible to the surgeon without compromising the patient. All the patients will be under general anaesthesia.

The patient needing the tendon repair has previously had MRSA and there is no evidence if the patient has had a recent negative swab, so precautions are necessary.

Task 1

You are required to complete the table.

Using the table below, explain the standard health and safety precautions when these patients and equipment are being moved, handled and transported:

	Standard health and safety precaution for the patient	Standard health and safety precaution for the equipment
Moved		
Handled		
Transported		

From your responses in the table above, explain what the consequences would be if the standard health and safety precautions were not followed.

(AC1.1, 1.2)

Task 2

You are required to produce a written explanation.

During any surgical operation there are safe techniques and procedures that are followed when moving and positioning the individual and the equipment in a perioperative environment. Explain these techniques and procedures according to local and organisational policies and procedures using one of the operations that is being performed in the scenario. (AC1.3)

Task 3

You are required to produce a written explanation.

Considering the whole scenario, explain the importance of using personal protection equipment (PPE) whilst in the theatre and identify situations where you might need to use additional PPE (stating the additional PPE needed). (AC1.4, 1.5)

Task 4

You are required to produce a written explanation.

During any procedure, big or small, it is important to understand the requirements for pressure area care. Explain how you can contribute to the maintenance of the skin integrity of the 3 patients in the scenario, including risk assessments and how you can minimise the risk to tissue damage, using the appropriate equipment. (AC2.1, 2.2, 2.3)

Task 5

You are required to produce a written explanation.

Explain the importance of recording and reporting skin integrity using the appropriate documents in line with local policies and protocols. What documents would you use? (AC2.4)

Task 6

You are required to produce a reflective account.

Transporting patients is required within the perioperative care environment. Reflect on an occasion when you have been able to prepare individuals to transport within the perioperative care environment, include:

- how you identified the nature of the task required in a discussion with the appropriate person, for example, registered practitioners or other appropriate colleagues
- what standard precautions you needed to apply for infection control when transferring the patient and what (if any) equipment you used
- how you checked transportation equipment was clean, safe and functioning in line with local policies and protocols
- what health and safety measures you implemented that were relevant to transporting the patient
- what potential hazards you needed to consider during the transportation - did any of these hazards occur and if so, who did you report them to
- a brief description of the type of patient that needed to be moved
- how you informed the patient of the nature and purpose of the transfer and the role of the people involved
- a description of the required documentation that included the care pathway for the patient
- a reflection on whether you met the standards - include any recommendations for your improvement on transporting individuals within the perioperative care environment.

(AC3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8)

Task 7

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace assisting in the transfer and positioning of individuals within the perioperative environment.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed demonstrating safe moving and handling techniques that minimise risk to all involved, including pain, friction and discomfort for those being moved (AC4.1)		
The learner is observed transferring and positioning patients according to instructions, confirming they are positioned safely, comfortably and in accordance with guidelines (AC4.2)		
The learner is observed maintaining the privacy, dignity, safety, security and comfort of patients while using the equipment for transfer and positioning (AC4.3)		
The learner is observed identifying the effects of premedication and anaesthesia on the ability of patients to move independently (AC4.4)		
The learner is observed using verbal and non-verbal skills to support patients, closely observing and reporting any changes in condition to the appropriate team member (AC4.5)		
The learner is observed transferring the patient and their associated documentation over to		

the appropriate member of staff in the perioperative environment (AC4.6)		
The learner is observed returning the equipment to the correct location in good working order (AC4.7)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

THEA 8: measure and record individuals' body fluid balance in a perioperative environment

Scenario

You are the support staff in the gynaecology theatre where body fluids are to be measured and recorded.

Task 1

You are required to produce a reflective account to include:

- referring to your knowledge and experience, state the purpose of measuring an individual's fluid balance and wound drainage and the factors that could affect fluid input, output and wound drainage (AC1.1, 1.2)
- outline the potential hazards associated with measuring an individual's body fluids and wound drainage and ways to prevent them following health and safety policies and procedures (AC1.3)
- referring to your knowledge and experience, describe adverse circumstances related to measuring and recording an individual's fluid balance that would require immediate reporting (AC1.4)
- discuss organisational policies and procedures on the correct disposal of single use equipment and other hazardous waste (AC1.5)
- state ten pieces of equipment used in measuring fluid balance and wound drainage (AC1.6)
- outline the organisational policies and procedures for reporting and recording faulty equipment (AC1.7)
- referring to your knowledge and experience, state the importance of working within the sphere of your competence. (AC1.8)

Task 2

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace measuring, recording and reviewing an individual's body fluid balance in a perioperative environment.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
Learner is observed confirming the individual's identity and gaining valid consent (AC2.1)		
Learner is observed applying standard precaution such as correct hand hygiene and correct wearing of PPE when handling body fluids (AC2.2)		
Learner is observed:		

<ul style="list-style-type: none"> • adhering to health and safety measures pertaining to recording an individual's body fluid balance • measuring and recording individual's fluid input, output and wound drainage in accordance with local policies and procedure • identifying the difference between an individual's body fluids and other fluids • reviewing individual's body fluid in line with local policy and procedure. <p>(AC2.3, 2.4, 2.5, 2.6, 2.7)</p>		
<p>Learner is observed:</p> <ul style="list-style-type: none"> • reporting relevant problems encountered whilst measuring or recording fluid balance in line with local policy and procedures • reporting results to the registered practitioner in line with local policy and protocol. (AC2.8, 2.9) 		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Task 3

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace managing equipment after measuring an individual's body fluid balance.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
Learner is observed:		

<ul style="list-style-type: none">• ensuring that all reusable equipment is properly cleaned after use, using the appropriate materials in accordance with local policies and protocols• returns equipment used appropriately to the storage or collection location (AC3.1, 3.2)		
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Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

THEA 9: assist in the delivery of perioperative care and support the individual

Scenario

In the trauma theatre there is a list of patients that need emergency operations. The list will start with a young child that needs a foreign object removing from their ear. The child will need a mild sedative before they come to theatre as they are upset and anxious. The child will receive general anaesthesia once in the anaesthetic room. The parent will be present until the child is anaesthetised.

Task 1

You are required to produce a written explanation.

Explain the effects of premedication and sedation on the child and how these affect support and monitoring requirements. Also, explain how important it is to ensure the environment is suitable for the conscious / unconscious child. (AC1.1, 1.2)

Task 2

You are required to complete the table.

Identify the factors that can cause stress and distress in the perioperative environment and procedures including the signs of distress that may be exhibited and how these affect support requirements. Use examples of a child, an adult, a person with learning difficulties, mental health issues and an individual of ethnic origin. (AC1.3, 1.4)

	Factors that cause stress and distress	Signs of distress	How do these affect support requirements
Child			
Adult			
An individual with learning difficulties			
An individual with mental health issues			
An individual of ethnic origin			

Task 3

You are required to produce a reflective account.

Using verbal and non-verbal communication is necessary for the patient during their perioperative experience, this will support the patient's comfort, privacy, dignity, and emotional and physical care. Choose 3 patients that have been in your care and write a reflective account on how you used verbal and non-verbal communication to support them according to their care plan.

In the reflection, you must include how you communicated information that is sensitive to the patient's personal beliefs and preferences. Preferences could include:

- values
- culture
- aspirations
- wishes.

Finally, conclude your reflective account explaining how you have responded to patients if they have asked you questions that you have minimal knowledge about and/or queries outside your own sphere of competence, in accordance with local policy and protocol.

(AC2.1, 2.2, 2.3)

Task 4

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace supporting individuals in a perioperative environment according to their care plan.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed providing support and care to the patient to promote their comfort in the perioperative environment (AC2.4)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Task 5:

Arrange a professional discussion with your line manager, mentor or assessor.

Prepare for the professional discussion surrounding the role assisting in the delivery of perioperative care and support to individuals.

You are required to submit your notes.

Using the scenario from task 1 and the subsequent information, prepare notes to assist you on criteria in the bulleted list below.

After being given a mild sedative the child starts to breathe slowly, then vomits, you continue to monitor the child, but the parent is concerned and starts to ask questions.

You are expected to prepare notes to assist you on the criteria below:

- explain the importance of closely monitoring the patient in the perioperative environment
- identify any changes in the patient's condition that concerns you
- explain how you would seek advice about these changes and concerns about the patient's condition in line with local policy and protocol
- where would you record these outcomes of monitoring activities in line with local policy and protocol
- how would you pass this information onto other team members in line with local policy and protocol?

(AC3.1, 3.2, 3.3, 3.4, 3.5)

THEA 10: prepare and dress for scrubbed clinical roles

Scenario

The preparation and dressing for clinical roles (surgical scrub) is an important procedure to reduce the risk of contamination throughout any operative procedure.

You are supporting with a clinical procedure and are preparing and dressing for the procedure with a registered practitioner.

Task 1

You are required to produce a reflective account.

As part of this task, you must fully respond to all the questions written below:

- discuss how national guidelines and local policies and protocols influence selection and preparation of personal protective equipment (PPE) (AC1.1)
- referring to your knowledge and experience, explain the difference between an aseptic environment and a sterile field, and the importance of reporting a potential contamination. (AC1.2, 1.3)

Task 2

You are required to produce a written explanation.

Scenario

You are in the preparation room getting scrubbed up for a procedure to demonstrate your knowledge and understanding of dressing for the clinical role.

You need to provide a written explanation of the following:

- how you are going to follow infection control measures
- the factors influencing your choice of PPE
- the importance of wearing PPE
- the importance of changing PPE once it is contaminated.

(AC2.1, 2.2, 2.3, 2.4)

Task 3

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace working within scrubbed clinical roles.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed'.

Assessment criteria to be observed	Achieved with supporting information	Areas to review
Learner is observed applying standard precautions such as correct hand hygiene in preparation for a scrub role (AC3.1)		
Learner is observed selecting and wearing the appropriate PPE for the correct procedure implementing health and safety measures relevant to scrubbed role (AC3.2, 3.3)		
Learner is observed being able to identify and maintain the sterile field disposing of PPE in the correct manner and identifying contaminated items and reporting them when necessary (AC3.4, 3.5, 3.6)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

THEA 11: prepare and provide surgical instrumentation and supplementary items for the surgical team

Scenario

You are working in an orthopaedic theatre, with ten arthroscopic cases and four open cases. Your duty is to ensure that all scopes, camera stack systems and all other needed supplementary instrumentation are present before the surgery, used appropriately and accounted for post operatively. Use this information to complete the subsequent tasks.

Task 1

You are required to produce a reflective account.

Explain how the sterile field effectively prevents infections during surgical procedures, how to maintain the sterile field and actions to take in an event where it is compromised. (AC1.1, 1.2)

Give a comprehensive explanation of the commonly utilised surgical instruments, encompassing their various types, purposes, and functions. Discuss any potential hazards that may arise due to their use. (AC1.3)

Referring to your knowledge and experience, describe commonly used supplementary items and their purpose during surgery. (AC1.4)

During the procedure it is discovered that a drill is faulty. It had worked when preparing for the procedure but stopped working for the surgeon once the surgery had begun. How could this situation be rectified and what other issues or malfunctions could occur? (AC1.5)

Explain the principles and techniques used for counting instruments, sharps, swabs, and supplementary items. Explain why they are important. (AC1.6)

Task 2

This task requires a completed observation grid.

As a member of support staff in an orthopaedic theatre, you have been given the task of getting all the surgical instrumentation and supplementary items ready for the day cases. You also have the responsibility of keeping counts and surgical instrumentation as well as obtaining other items that may be asked for during the procedures.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace preparing surgical instruments and supplementary items for the surgical team.

Note to assessor / expert Witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed applying standard precautions for infection control (AC2.1)		

The learner is observed always maintaining compliance with health and safety guidance (AC2.2)		
The learner is observed checking surgical instruments and supplementary items before preparation and confirms as being within expiry date, safe and fit for purpose (AC2.3)		
The learner is observed selecting and preparing required surgical instruments and supplementary items for the procedure (AC2.4)		
The learner is observed arranging surgical instruments and supplementary items to meet the needs of the operative procedure and the individual's care plan (AC2.5)		
The learner is observed counting and recording instruments, sharps, swabs, and supplementary items prior to commencing the procedure in line with local policies and protocols (AC2.6)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Task 3

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace providing surgical instruments and supplementary items for the surgical team.

Note to assessor / expert Witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed handling instruments and		

supplementary items in line with local policies and protocols while maintaining the integrity of the sterile field. (AC3.1)		
The learner is observed anticipating the needs of the surgical team by monitoring their activities and the placement of items within the surgical field. (AC3.2)		
The learner is observed clarifying any uncertainty over the requirements of the surgical team with the appropriate person. (AC3.3)		
The learner is observed providing instrumentation and supplementary items to meet the needs of the surgical team and the individual's plan of care. (AC3.4)		
The learner is observed counting and recording instruments, sharps, swabs, and supplementary items during the process, and prior to close and completion, in line with national and local policies and protocols. (AC3.5)		
The learner is observed informing the surgical team of instrument and supplementary item counts during the procedure in line with local policies and protocols. (AC3.6)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Task 4

This task requires a completed direct observation / expert witness testimony form.
Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace disposing of waste from the sterile field.

Note to assessor / expert Witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed disposing of and transferring used instruments and supplementary items to the non-sterile area for accounting, tracking and traceability in line with local policies and protocols (AC4.1)		
The learner is observed updating records in line with national guidelines (AC4.2)		
The learner is observed removing and disposing of drapes in line with local policies and protocols (AC4.3)		
The learner is observed maintaining the dignity of the individual throughout the procedure in line with local policies and protocols (AC4.4)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

THEA 12: prepare and apply dressings and drains to individuals in the perioperative environment

Scenario

Your task is to assist the scrub person placing drains and applying dressings in an aseptic manner for the patient who has undergone a bilateral breast reconstruction. Two drains and dressings must be prepared after the reconstruction is completed. It is crucial to place the drains before closing the wounds and open them during the patient's recovery period.

Task 1

You are required to produce a reflective account.

Provide an explanation of how the principles of asepsis, antisepsis, and cross-infection would be implemented regarding the patient and procedure. (AC1.1)

Identify the potential sources of contamination when preparing this surgical field and how you would prevent contamination in this scenario. (AC1.2)

Using the scenario above, explain the wound healing and the care principles needed for the patient. Identify the types of pathogens that commonly cause wound infection and the consequences of contamination. (AC1.3, 1.4)

Based on your previous knowledge and experience, which dressings and drains are recommended for managing wounds in a bilateral breast reduction, considering the type and size of the wound. (AC1.5)

Task 2

You are required to produce a reflective account.

Provide a comprehensive explanation on the application of medical devices for dressing and draining purposes in bilateral breast reconstruction procedures. Furthermore, it is essential to highlight any possible risks and hazards that may be related to the utilisation of these devices. (AC2.1, 2.2)

Referring to your knowledge and experience, explain what factors are considered when selecting medical devices for dressing and drainage, and how attachment sites are determined on patients? (AC2.3, 2.4)

Task 3

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace selecting and preparing dressing and drains according to individual requirements.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed confirming the individual's identity and gaining valid consent (AC3.1)		
The learner is observed giving the individual information and reassuring them when preparing to administer a dressing or drain (AC3.2)		
The learner is observed applying standard precautions for infection control (AC3.3)		
The learner is observed implementing health and safety measures relevant to preparing dressings and drains (AC3.4)		
The learner is observed identifying, through discussion with the individual, any allergies they may have that will affect the types of dressing used (AC3.5)		
The learner is observed selecting and preparing dressings to suit the size and type of wound and promote healing (AC3.6)		
The learner is observed preparing drains according to local policies and protocols (AC3.7)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Task 4

This task requires a completed observation grid.

Provide a copy of this sheet to your assessor / line manager / qualified nurse / qualified senior support worker or other professional who has observed you within your workplace applying dressings and attaching drains according to individual requirements.

Note to assessor / expert witness: state in detail what you have observed the learner complete from the following competencies. Include in detail what was observed and avoid a rewrite of the criteria itself.

If any of these have not been observed, it is good practice to state 'not observed.'

Assessment criteria to be observed	Achieved with supporting information	Areas to review
The learner is observed applying the dressing or attaching the drain to the individual in accordance with local policies and protocols (AC4.1)		
The learner is observed checking that the dressing has been applied correctly, ensuring that: <ul style="list-style-type: none"> the pressure is consistent with the type of wound drains are secure vacuum seals on the drains are intact the position of the drain prevents siphonage and / or harm to the individual. (AC4.2) 		
The learner is observed reporting any issues outside their own sphere of competence in line with local policy and protocol (AC4.3)		
The learner is observed updating records in line with local policy and protocol (AC4.4)		

Assessor role in working environment:

Assessor name:

Assessor signature:

Date:

Change history record

Version	Description of change	Date of issue
V1.0	First publication	August 2025